

LOANSTAR PILOT PROGRAM

“5-FIVE-25”

The State Energy Conservation Office

<http://seco.cpa.state.tx.us/>

Webinar- May 30, 2013

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About SECO

Mission Statement: to increase the efficient use of energy and water while protecting the environment

- One of 56 state/territory “energy offices”
- Located in the Texas Comptroller or Public Accounts
- Focus is technology deployment – no R&D
- U.S. Department of Energy state level program conduit
 - State Energy Program (SEP)
 - ARRA (stimulus funds)

Major Focus Areas

Emerging clean energy technology

Energy training and education

Efficiency grants/financing and technical assistance

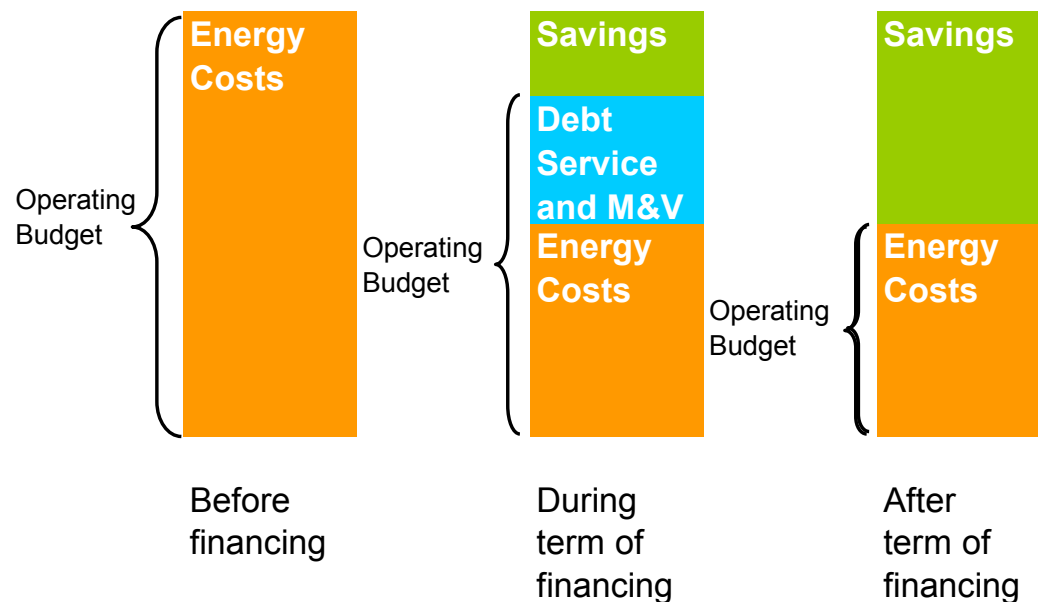
- LoanSTAR revolving loan program

LoanSTAR “5-FIVE-25” Pilot Program

- The Texas LoanSTAR (Saving Taxes and Resources) Program is a finance program that provides low interest rate loans for energy-related cost-reduction efforts.
- The “5-FIVE-25” Pilot Program ([Tex. Gov’t Code §2305.0322](#)) is intended to finance energy-related cost-reduction retrofits for facilities owned and occupied by non-profit community based organizations and Houses of Worship

LoanSTAR “5-FIVE-25” Pilot Program

- Self-servicing debt – borrowers repay loans through savings/avoided costs



Application Deadlines

Description	Date
Issuance of Request for Application	April 26, 2013, after 10 a.m. CST
Submission of Questions	June 7, 2013, 2 p.m. CST
Official Response to Questions Posted	June 14, 2013, or as soon thereafter as practical
Application Deadline	June 28, 2013, 2 p.m. CST
Loan Award	July 19, 2013, or as soon thereafter as practical

Who Qualifies

Non-profit Community-based Organizations

- A nonprofit corporation or association that is located in close proximity to the population the organization serves

Houses of Worship- A nonprofit corporation or association that:

- is operated through a religious or denominational organization, including an organization that is operated for religious, educational, or charitable purposes and that is operated, supervised, or controlled, wholly or partly, by or in connection with a religious organization; or
- clearly demonstrates through the organization's mission statement, policies, or practices that the organization is guided or motivated by religion.

***Non-Profit or House of Worship must own and occupy building.**

Program Terms

- The "5-FIVE-25" Pilot Program name is based on the loan structure: **5%** interest rate, **five-year** loan repayment term, and **\$25,000** maximum loan amount.
- Project expenses will be reimbursed on a “cost reimbursement” basis.
- Borrower will be required to comply with federal Solid Waste Disposal Act, and, if applicable, National Environmental Policy Act, and National Historic Preservation Act.
- All improvements must meet minimum efficiency standards as prescribed by applicable building energy codes.

Eligible Energy Cost Savings Projects

Examples of acceptable projects include:

- Lighting and lighting controls
- HVAC and related equipment
- Energy management systems and equipment control automation

"Energy Efficiency: Texas' Newest Energy Resource."

 **Susan Combs** Texas Comptroller of Public Accounts

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As the state energy office, SECO partners with Texas consumers, businesses, educators and local governments to reduce energy costs and maximize efficiency.

Targeted Tips and Tools:

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Funding and Incentives

Funding Opportunities

April 2013 Opportunities

Notice of Loan Fund Availability (NOLFA) – LoanSTAR Program

Posted April 26, 2013 – The Comptroller of Public Accounts (Comptroller) State Energy Conservation Office (SECO) will provide low interest loans to assist selected public entities in financing their energy-related cost-reduction efforts through the LoanSTAR revolving loan program.

Notice of Loan Fund Availability (NOLFA) – “5-FIVE-25” Program

Posted April 26, 2013 – The Comptroller of Public Accounts (Comptroller) State Energy Conservation Office (SECO) will provide low interest loans to selected non-profit community based organizations and Houses of Worship for the purposes of implementing energy-related cost-reduction retrofits at owner owned and occupied facilities utilizing the LoanSTAR revolving loan program

Alternative Fuels Initiatives Grant Program (SEP Program 2.2)

Posted April, 2013

The Comptroller of Public Accounts, State Energy Conservation Office (SECO) will provide grant funding for eligible public entities to transition vehicle fleets to alternative fuels.

February 2013 Opportunities

Innovative Energy Demonstration Grant Program (SEP Program 2.2)

Posted February 15, 2013

The Comptroller of Public Accounts, State Energy Conservation Office (SECO) will provide grant funding to eligible Texas local governments, school districts, state agencies and public institutions of higher education to demonstrate renewable energy technologies by installing small scale systems.

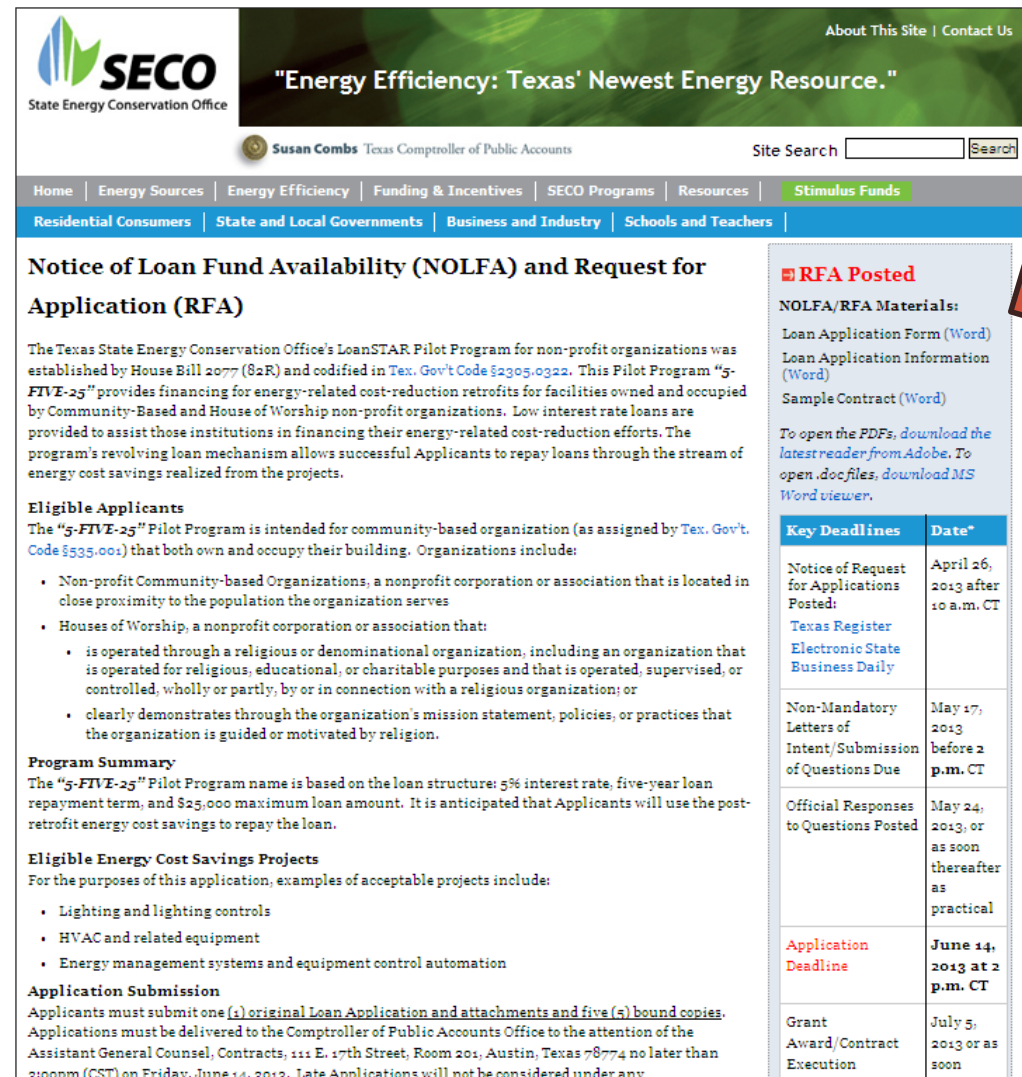


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<http://seco.cpa.state.tx.us/funding/>

Notice of Loan Fund Availability



SECO
State Energy Conservation Office

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Notice of Loan Fund Availability (NOLFA) and Request for Application (RFA)

The Texas State Energy Conservation Office's LoanSTAR Pilot Program for non-profit organizations was established by House Bill 2077 (82R) and codified in [Tex. Gov't Code §2305.0322](#). This Pilot Program "5-FIVE-25" provides financing for energy-related cost-reduction retrofits for facilities owned and occupied by Community-Based and House of Worship non-profit organizations. Low interest rate loans are provided to assist those institutions in financing their energy-related cost-reduction efforts. The program's revolving loan mechanism allows successful Applicants to repay loans through the stream of energy cost savings realized from the projects.

Eligible Applicants

The "5-FIVE-25" Pilot Program is intended for community-based organization (as assigned by Tex. Gov't. Code §535.001) that both own and occupy their building. Organizations include:

- Non-profit Community-based Organizations, a nonprofit corporation or association that is located in close proximity to the population the organization serves
- Houses of Worship, a nonprofit corporation or association that:
 - is operated through a religious or denominational organization, including an organization that is operated for religious, educational, or charitable purposes and that is operated, supervised, or controlled, wholly or partly, by or in connection with a religious organization; or
 - clearly demonstrates through the organization's mission statement, policies, or practices that the organization is guided or motivated by religion.

Program Summary

The "5-FIVE-25" Pilot Program name is based on the loan structure: 5% interest rate, five-year loan repayment term, and \$25,000 maximum loan amount. It is anticipated that Applicants will use the post-retrofit energy cost savings to repay the loan.

Eligible Energy Cost Savings Projects

For the purposes of this application, examples of acceptable projects include:

- Lighting and lighting controls
- HVAC and related equipment
- Energy management systems and equipment control automation

Application Submission

Applicants must submit one (1) original Loan Application and attachments and five (5) bound copies. Applications must be delivered to the Comptroller of Public Accounts Office to the attention of the Assistant General Counsel, Contracts, 111 E. 17th Street, Room 201, Austin, Texas 78774 no later than 2:00pm (CST) on Friday, June 14, 2013. Late Applications will not be considered under any

RFA Posted

NOLFA/RFA Materials:

- Loan Application Form ([Word](#))
- Loan Application Information ([Word](#))
- Sample Contract ([Word](#))

To open the PDFs, download the latest reader from Adobe. To open .doc files, download MS Word viewer.

Key Deadlines	Date*
Notice of Request for Applications Posted: Texas Register Electronic State Business Daily	April 26, 2013 after 10 a.m. CT
Non-Mandatory Letters of Intent/Submission of Questions Due	May 17, 2013 before 2 p.m. CT
Official Responses to Questions Posted	May 24, 2013, or as soon thereafter as practical
Application Deadline	June 14, 2013 at 2 p.m. CT
Grant Award/Contract Execution	July 5, 2013 or as soon

The Application

<http://seco.cpa.state.tx.us/funding/nolfa/5FIVE25/>

The Application- Contact Info.

Part 1A: Applicant (Borrower)			
Name of Eligible Entity		Federal Tax ID	Application Date
Mailing Address		City	State Zip Code
County Name		Total Amount Requested (\$25,000 max.)	
		\$	

Part 1B: Chief Executive Officer (Signing Authority)			
First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

Part 1C : Applicant Primary Contact (Project Director)			
First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

The Application- Contact Info.

Part 1D : Applicant Secondary Contact (Energy Manager)			
First Name	Initial	Last Name	Title
Telephone	Extension	Fax	Email Address

Part 1E: Administrative Contact for Accounting (Financial Contact)				
First Name	Initial	Last Name	Title	
Mailing Address		City	State	Zip Code
Telephone	Extension	Fax	Email Address	

Part 1F: Signature and Certification by Applicant Chief Executive Officer or Chief Financial Officer		
I certify that I am the Chief Executive Officer and that I have reviewed this application and that I will agree to abide by the terms of the contract.		
Signature	Printed Name and Title	Date

The Application- Qualification Info.

PART 2: QUALIFICATION INFORMATION

2A. In an attachment, provide proof that the organization owns the space where the project will take place? In the space below, describe the information provided in the attachment.

2B. I certify that the loan will be paid in full prior to moving away from, renting or selling the premises.

☐ Yes ☐ No

2C. In an attachment, applicant must provide proof of non-profit incorporation in the State of Texas. Is this information included in an attachment?

☐ Yes ☐ No

2D. In an attachment, applicant must provide proof that the corporation is in good standing in the State of Texas. Visit <http://www.window.state.tx.us/taxinfo/coasintr.html> to locate your account status. Is this information included in an attachment?

☐ Yes ☐ No

2E. In an attachment, applicant must provide proof that organization has been in existence for a minimum of five years under the same name in the State of Texas. Is this information included in the attachment?

☐ Yes ☐ No

2F. In an attachment, applicant must provide documentation (Mission Statement, etc.) to show their purpose. Is this information included in the attachment?

☐ Yes ☐ No

2G. In an attachment, applicant must provide documentation to show the signing authority is authorized to bind the organization in a contract. Is the information provided in the attachment?

☐ Yes ☐ No

2H. Applicant agrees to the terms and conditions of the sample contract.

☐ Yes ☐ No

The Application- Project Details

Example: If you are replacing eight T12 fixtures with T8 fixtures, multiply \$40/Fixture by the quantity of fixtures (8) and calculate your total on the right.

Fluorescent Fixtures with Electronic Ballasts and T8 or T5 Lamps

28W Lamps or \geq LU/W Lamps \$40/Fixture x 8 = \$ 320

Lighting and Lighting Controls	Loan Amount	x Quantity	=	Total
Fluorescent Fixtures with Electronic Ballasts and T8 or T5 Lamps				
28W Lamps or \geq LU/W Lamps	\$40/Fixture	x _____	=	\$ _____
Compact Fluorescent Fixtures				
≤ 17W	\$10/Fixture	x _____	=	\$ _____
> 17W	\$15/Fixture	x _____	=	\$ _____
Exit Signs				
Electro-Luminescent or LED	\$25/Fixture	x _____	=	\$ _____
High Pressure Sodium or Metal Halide Fixtures				
≤ 100W	\$25/Fixture	x _____	=	\$ _____
> 100W	\$40/Fixture	x _____	=	\$ _____
Occupancy Sensors				
Infrared/Ultrasonic Dual Sensor	\$20/Sensor	x _____	=	\$ _____
Infrared	\$10/Sensor	x _____	=	\$ _____
Daylighting Controls				
Photocell Dimming	\$10/Ballast	x _____	=	\$ _____
LED Fixtures				
Recessed	\$20/Fixture	x _____	=	\$ _____
All Other 20% of Fair Market Value	\$ _____	x _____	=	\$ _____
TOTAL Lighting and Lighting Controls				\$ _____

The Application- Project Details (cont.)

HVAC and Other Equipment	Loan Amount	x	Quantity	=	Total
Package Rooftop Units (gas heat) and Split Systems (gas heat) SEER \geq 14.0 (\leq 5 tons) (cooling) EER \geq 11.2 ($>$ 5 tons) (cooling) Standard ARI Conditions AFUE \geq 80% (heating)	\$150/Ton	x	_____	=	\$ _____
Ground or Water Coupled Heat Pumps EER \geq 16.5 (cooling) COP \geq 3.8 (heating) ARI 320 Conditions	\$300/Ton	x	_____	=	\$ _____
Air Coupled Heat Pumps SEER \geq 13.2 (cooling) HSPF \geq 7.8 (\leq 5 tons) (heating) COP \geq 3.3 ($>$ 5 tons) (heating) ARI 210/240 Conditions	\$150/Ton	x	_____	=	\$ _____
Air Cooled Chillers with Condenser IPLV \geq 12.7 EER ARI 550/590-98 Conditions	\$100/Ton	x	_____	=	\$ _____
Water Cooled Chillers – Positive Displacement IPLV # 0.78 kW/Ton ($<$ 150 tons) IPLV # 0.72 kW/Ton (150 – 300 tons) IPLV \geq 0.62 kW/Ton ($>$ 300 tons) ARI 550/590-98 Conditions	\$120/Ton	x	_____	=	\$ _____

The Application- Project Details (cont.)

Water Cooled Chillers – Centrifugal

IPLV # 0.634 kW/Ton (< 150 tons)

IPLV # 0.634 kW/Ton (150 – 300 tons)

IPLV # 0.570 kW/Ton (> 300 tons)

ARI 550/590-98 Conditions \$140/Ton x _____ = \$ _____

Domestic Hot Water Tanks (gas-fired)

Thermal Efficiency ≥ 85%

100 gal \$15/gal x _____ = \$ _____

> 100 gal \$20/gal x _____ = \$ _____

Hot Water Boilers (gas-fired)

Thermal Efficiency ≥ 84%

< 1.0 MMBtu input \$2,700/MMBtu x _____ = \$ _____

1.0 – 3.0 MMBtu input \$2,000/MMBtu x _____ = \$ _____

> 3.0 MMBtu input \$1,800/MMBtu x _____ = \$ _____

Electric Motors

Premium Efficiency

< 25 – 100 hp \$15/hp x _____ = \$ _____

125 – 200 hp \$20/hp x _____ = \$ _____

The Application- Project Details (cont.)

HVAC and Other Equipment	Loan Amount	x Quantity	Total
Variable Frequency Drives			
< 25 hp	\$50/hp	x _____ =	\$ _____
25 – 40 hp	\$35/hp	x _____ =	\$ _____
50 – 100 hp	\$30/hp	x _____ =	\$ _____
125 – 200 hp	\$25/hp	x _____ =	\$ _____
Energy Management Systems (DDC) and Automation Controls			
Frontend and System Software			
Required	\$150/Point	x _____ =	\$ _____
Frontend and System Software			
Not Required	\$100/Point	x _____ =	\$ _____
TOTAL HVAC and Other Equipment			\$ _____

Total Loan Request

TOTAL Lighting and Lighting Controls	\$ _____
TOTAL HVAC and Other Equipment	\$ _____
Total Loan Request	\$ _____

The Application- Evaluation Form

Applications will be evaluated under the general criteria outlined below. The Comptroller will make the final decision. The Comptroller reserves the right to accept or reject any or all applications submitted. The Comptroller is not obligated to execute a loan agreement on the basis of this NOLFA / RFA. The Comptroller shall not pay for any costs incurred by any entity in responding to this NOLFA / RFA. Comptroller and SECO may request additional information at any time if deemed necessary for further evaluation. General evaluation criteria are as follows and as set forth in the application instructions. Answer the following Qualification Requirement questions.

Qualification Requirements	
1. Has the applicant provided proof that the organization owns the space where the project will take place?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Has the applicant certified that the loan will be paid in full prior to moving away from, renting or selling the premises?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Has the applicant provided proof of non-profit incorporation in the State of Texas?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Has the applicant provided proof that the incorporation is in good standing in the State of Texas?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Has the applicant provided proof that organization has been in existence for a minimum of five years under the same name in the State of Texas?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Has the applicant provided documentation (Mission Statement, etc.) to show their purpose?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Has the applicant provided documentation to show the signing authority individual is authorized to bind the organization in a contract?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If the answer to any of the above is “no”, do not proceed. Project is disqualified from further loan consideration.	

The Application- Self Score

Description	Applicant Self-Score
<p>1. Does the application include a request for funding of lighting and lighting controls? (24 points)</p> <ul style="list-style-type: none"> • If yes, write “24” in column and continue with evaluation. • If no, write “0” in column and continue with evaluation. 	<p>—</p>
<p>2. Does the application include a request for funding of HVAC and other equipment? (24 points)</p> <ul style="list-style-type: none"> • If yes, write “24” in column and continue with evaluation. • If no, write “0” in column and continue with evaluation. 	<p>—</p>
<p>3. What is the name of the county and the county population where project retrofit activities will take place? (http://quickfacts.census.gov/qfd/states/480001k.html)</p> <p>County Name: _____ County Population: _____</p> <ul style="list-style-type: none"> • County population less than 10,000 - 2 points • County population between 10,001 to 100,000 – 1 points • County population greater than 100,000 – 0 points 	<p>—</p>
<p style="text-align: right;">Total Base Score (Maximum 50 points)</p>	<p>—</p>

Application Deadlines

Description	Date
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Submission of Questions	June 7, 2013, 2 p.m. CST
Official Response to Questions Posted	June 14, 2013, or as soon thereafter as practical
Application Deadline	June 28, 2013, 2 p.m. CST
Loan Award	July 19, 2013, or as soon thereafter as practical

Submitting Applications

- Applicants must submit one (1) original Loan Application and attachments and five (5) bound copies.
- Applications must be delivered to:
The Comptroller of Public Accounts Office
Attn: Assistant General Counsel, Contracts
111 E. 17th Street, Room 201
Austin, Texas 78774.
- Application are due no later than 2:00pm (CST) on Friday, June 28, 2013. Late Applications will not be considered under any circumstances.

Q&A

contracts@cpa.state.tx.us

Official responses to all questions will be posted
on the SECO website on June 14, 2013 at
<http://seco.cpa.state.tx.us/funding/nolfa/5FIVE25/>